

# Canby Housing and Economic Development Needs & Opportunities

## OPEN HOUSE



July 14, 2022



City of  
**Canby**

**3J CONSULTING**  
CIVIL ENGINEERING | WATER RESOURCES | COMMUNITY PLANNING

**FCS GROUP**  
Solutions-Oriented Consulting

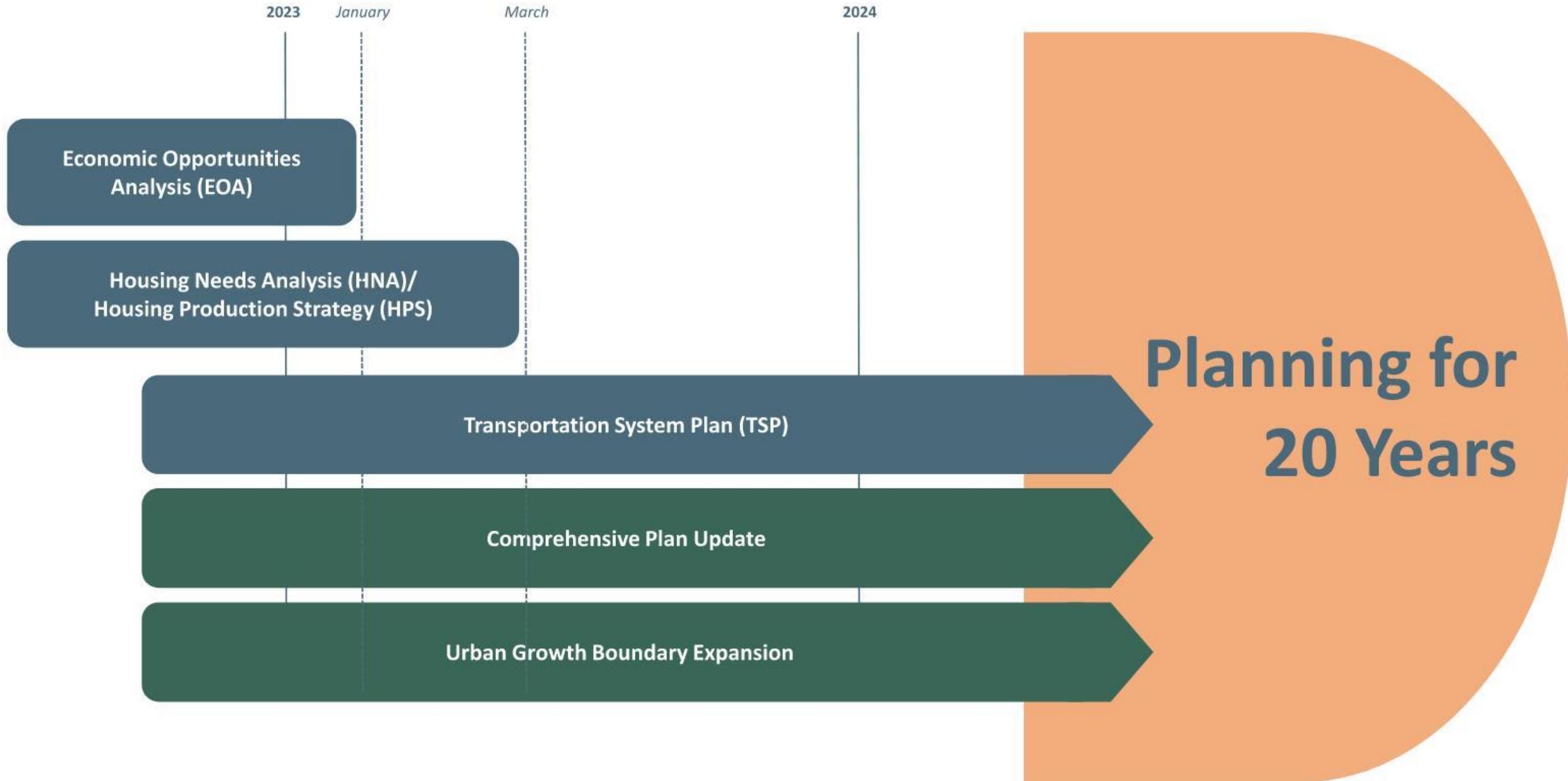


# Agenda

- **Project Overview**
- **Housing Needs**
- **Employment Needs**
- **Buildable Land Inventory**
- **Residential Land Supply/Demand**
- **Policy Discussion**
- **Next steps**



# 20-Year Planning Efforts



# Housing Needs Analysis Overview

OAR 660, ORS 197.296 and divisions 7, 8 & 24 provide a framework for Comp. Plan amendments related to Housing Needs Analysis (HNA):

- Housing needs projection
- Buildable land inventory (BLI)
- Residential land needs analysis
- Policy measures for accommodating needed housing



*HB 4006 puts new emphasis on addressing severe rent burdens\**

*\* When households spend over 50% of income on gross rent*

# Economic Opportunities Analysis Overview

**Canby's vision for strengthening economy** through economic policies that include **community development objectives** related to:

- Urban land requirements (land needs) for 20-year employment growth forecasts.
- Buildable Land Inventory.
- Equity & Inclusion: Priority Populations
- Community Participation
- Policy Goals and Objectives



*OAR 660-009  
EOA Policy Update*

# City Council Goals and Potential Actions

Goal Areas	Potential Actions	Notes
Align resources to address future community growth	Economic needs analysis	underway
	Housing needs analysis	underway
	Update the City's Comprehensive Plan	emphasize zoning changes to support future UGB expansion
	Update the City's development code	Use consultant resources
	Urban growth boundary expansion	
	Area J "Walnut" master planning	
	Expand downtown housing opportunities	
	Expand the Canby Area Transit circulator routes	
Plan a transportation system that eases the impacts of community growth	Canby ferry future	
	Update the transportation system plan	
	Build relationships with ODOT and Clackamas County to plan and fund transportation improvements	this will include a sidewalk gap analysis, bike lanes, and pedestrian paths
	Conduct advocacy for Berg Parkway	
	Review Park Master Plan priorities and align projects with funding that addresses development and maintenance	
Develop a more robust parks and recreation program aligned with the needs identified in the Parks Master Plan	Explore partnership options with the School District for property sale, exchange, or long-term lease	
	Pursue the legal determination on Wayside use	
	Evaluate sustainability	
	Develop a communication and engagement plan	This needs additional discussion
Enhance engagement and communications that represents broad perspectives	Develop a legislative program and advocacy strategy	
	Evaluate the implementation of a Youth Advisory Council	Explore lobbyist for Federal advocacy, resources for Council to lobby at the State
	Determine the future of the Urban Renewal Agency	
Promote financial sustainability	Assess the City's reserve levels and balance savings and investments with spending to meet community needs	close and return money or spend money then close it
	Use ARPA funds to recover loss and build for the future	
	Evaluate the City's fee structure	develop clear guidelines
	Increase engagement with the budget committee	street maintenance fee adjustment

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# Community Outreach

## Housing Producers

- Developers
- North Willamette Habitat for Humanity
- Land use attorney
- Apartment complex manager

## Housing Consumers

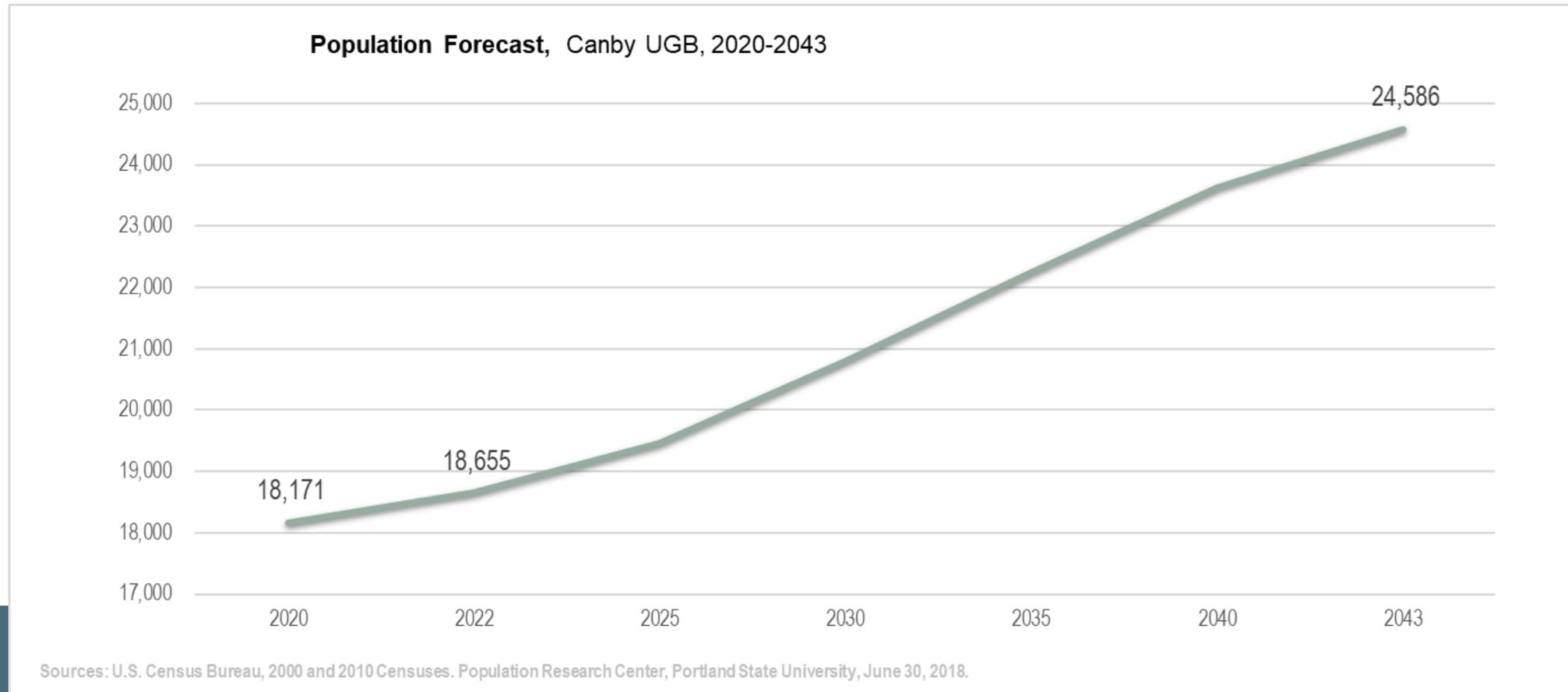
- Hope Village (staff)
- Canby Center (staff)
- Canby Adult Center (staff)
- Canby Adult Center Focus Group
- Bridging Cultures



# Housing Needs

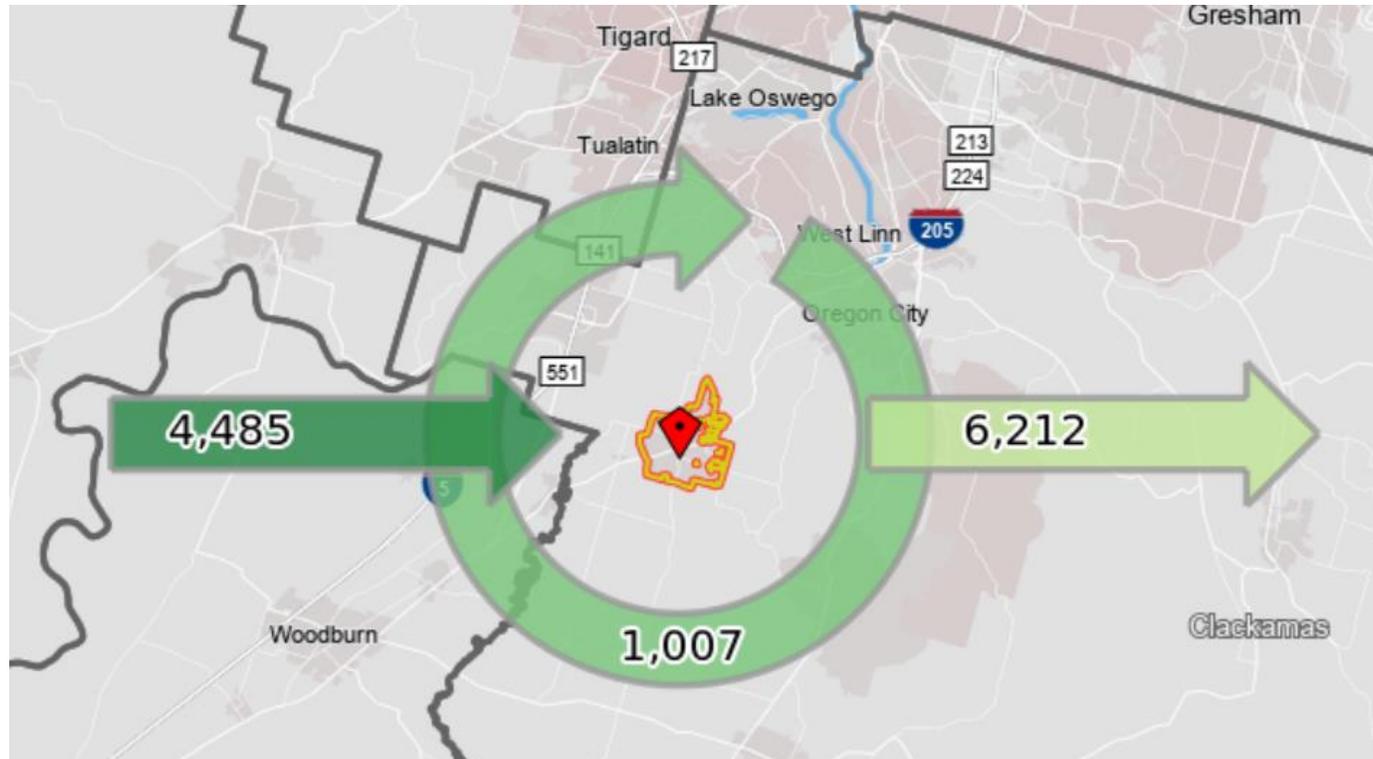
# Population Growth Forecast

- Canby UGB is projected to add +/-5,931 people over next 20 years
- Housing need exceeds population growth rate as household size decreases



# Canby's Live/ Work Patterns

- 4,500 workers in-commute to Canby from elsewhere
- 1,000 residents of Canby live and work in the city
- 6,212 Canby residents leave town for work
- Additional housing near Canby jobs could help address housing needs



# Median Home Prices are Way Up

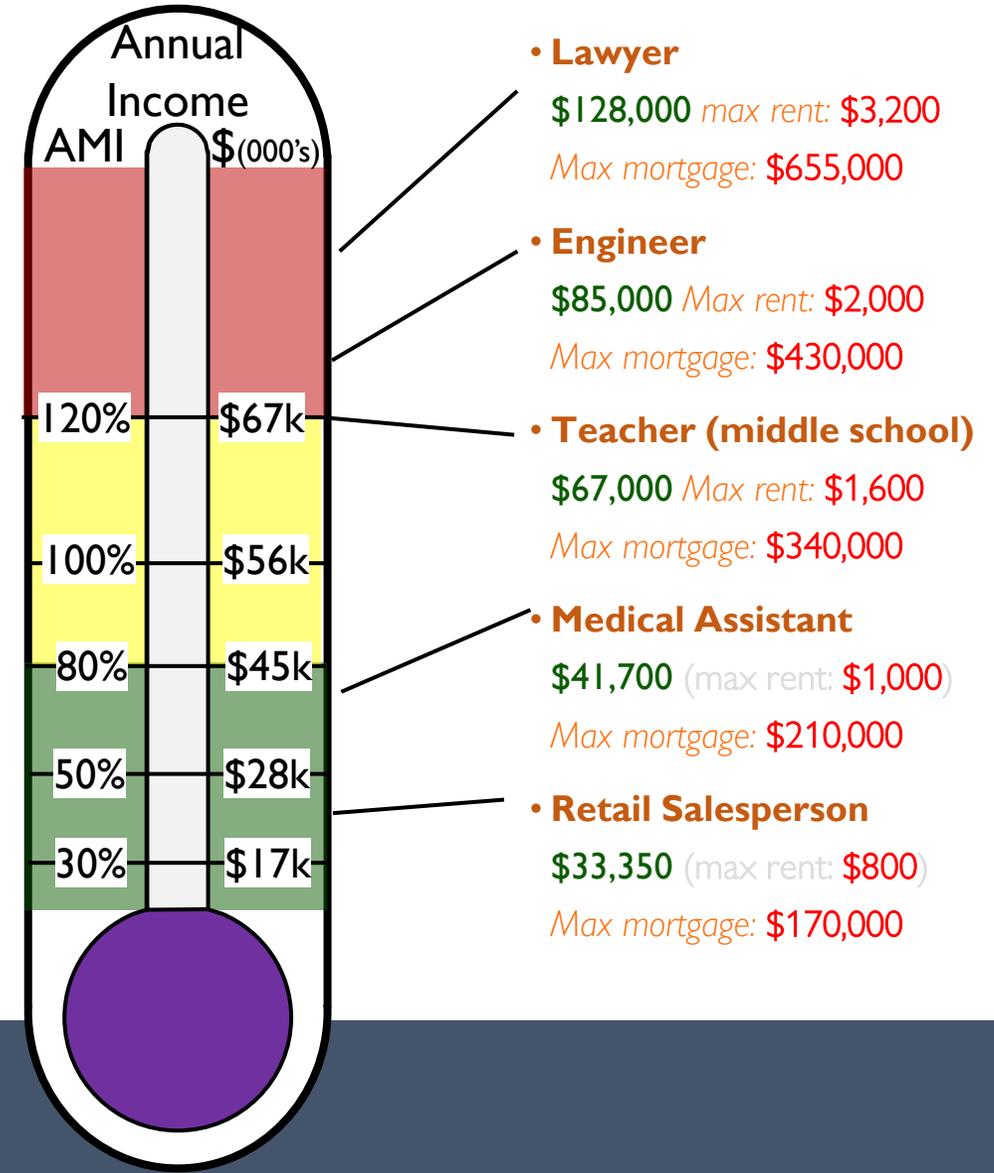
- Home values have been growing rapidly in the region
- Canby median home sales price at \$560,000 (Dec. 2021)
- 28% home value increase over last two years

Median Home Price Sales Trends in Select Markets				
	Dec-19	Dec-20	Dec-21	Change %
City of Canby	\$432,000	\$463,000	\$560,000	13.9%
Aurora	\$362,000	\$393,000	\$479,000	15.0%
Wilsonville	\$470,000	\$503,000	\$606,000	13.6%
Oregon City	\$446,000	\$479,000	\$579,000	13.9%
Butteville	\$313,000	\$345,000	\$416,000	15.3%

**Source:** Zillow.com; analysis by FCS 1/21/22

# Attainable Housing Thermometer

- The median income of all households
- HUD measures affordability by county
- HUD bases affordability on household size
- Useful for contextualizing home prices based on the affordability of expected monthly payments
- Allows for quantification of the suitability for housing types by income level



# Projected Housing Needs

- Canby should plan for 2,235 new dwelling units over next 20 years
- Market will support a mix of detached homes and “middle housing” types

Dwelling Unit Type	20-Year Dwelling Unit Demand
Single Family Detached	1,384
Mfd. Homes & Cottages	155
Townhomes / Plexes	319
Multifamily (5+ units)*	378
<b>Total</b>	<b>2,235</b>

Source: Canby Residential Needs Analysis Memorandum, May 10, 2022.

\* Category also includes group quarters housing demand .

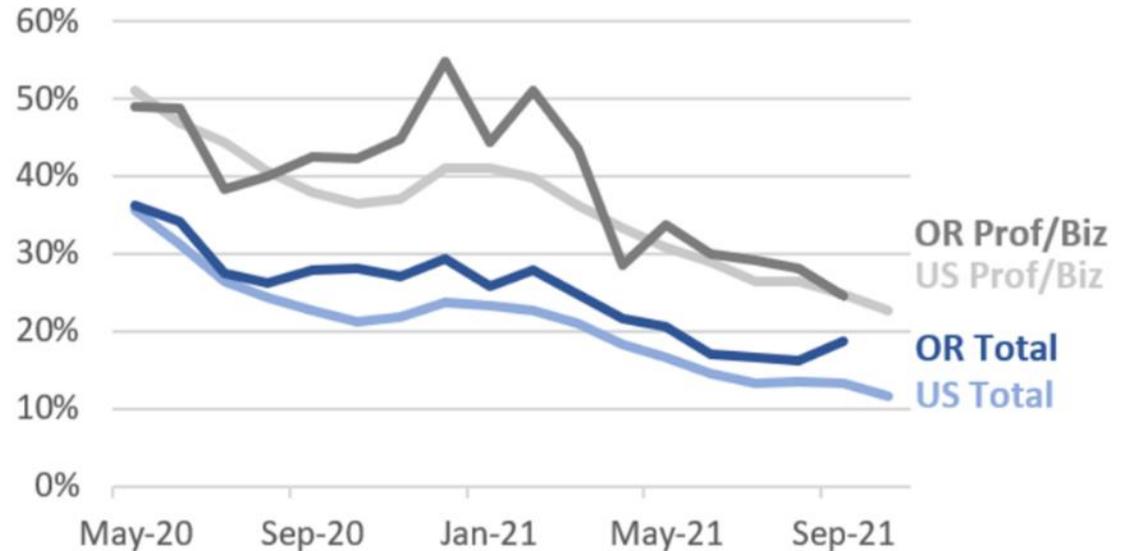
# Economic Opportunities

# Regional Trends

- Aging population
- Labor force participation dropping
- Working from home
- Migration from cities to burbs
- Zoom Cities
- Housing costs / availability
- Incomes not keeping up with cost of living

## Workers are Returning to the Office

Share of Employed Telecommuting Due to COVID-19



Latest Data: Oct '21 US, Sep '21 OR | Source: BLS, IPUMS-CPS, Oregon Office of Economic Analysis

Median Family Income Trends			
	2010	2020	AGR
Canby	\$67,370	\$87,173	2.6%
Clackamas County	\$74,905	\$100,172	2.9%
Oregon	\$60,402	\$80,630	2.9%

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates (Table B10113)

AGR: average annual growth rate

# Canby Trends

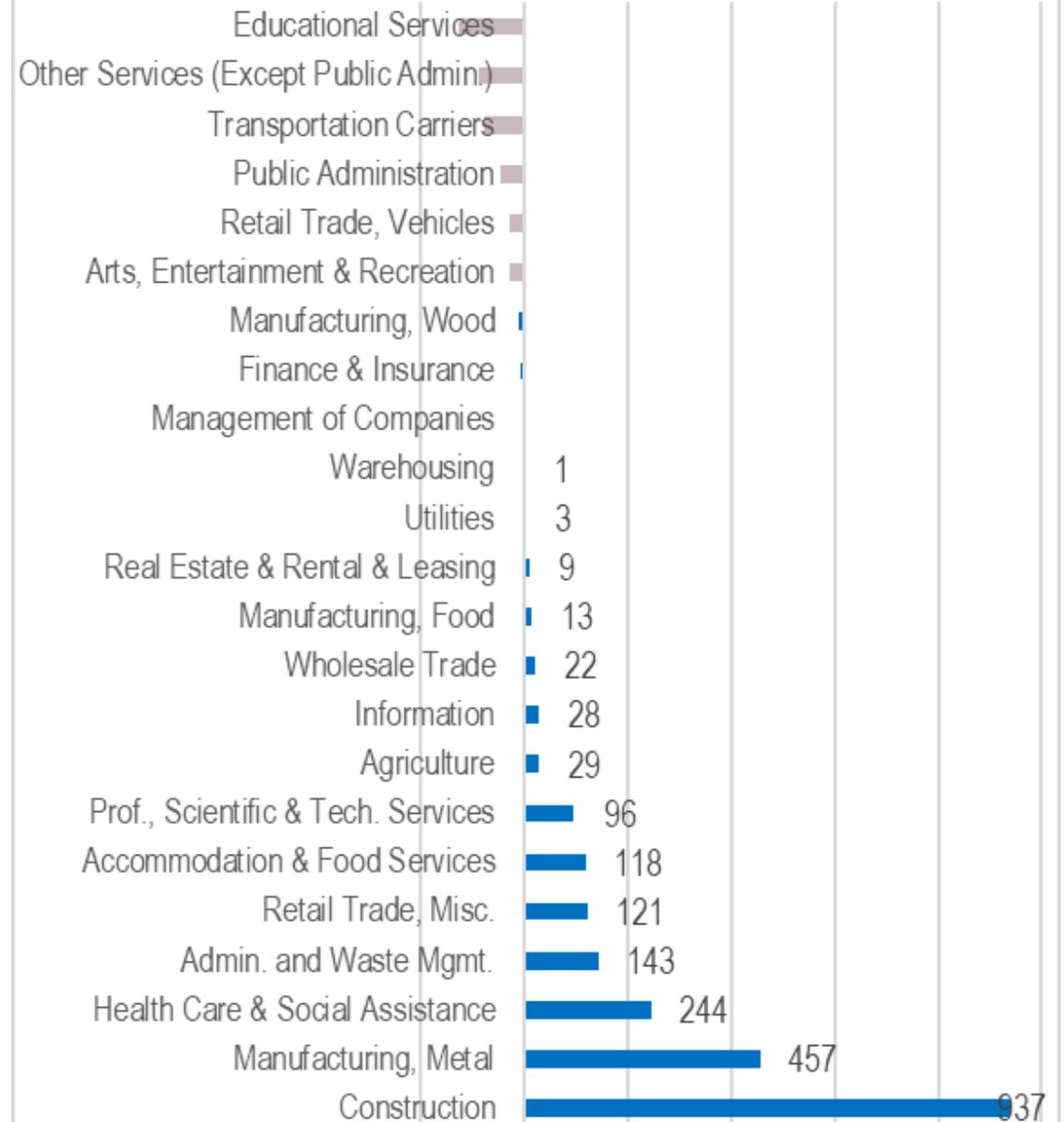
- Most job growth is occurring on industrial zoned land
- Fast-growing sectors: construction, metal manufacturing, health care, services and high-tech

**Canby "Covered Employment", 2009 and 2020**

Sector	2009	2020	Change in Jobs	% Change
Industrial Trades	2,171	3,517	1,346	62%
Retail Trade	689	780	91	13%
Services	2,257	2,642	385	17%
Government	137	89	(48)	-35%
<b>Total</b>	<b>5,254</b>	<b>7,028</b>	<b>1,774</b>	<b>34%</b>

Source: Oregon Employment Department QCEW Database

**Change in Covered Employment in Canby: 2009 to 2020**



# Canby Trends

- Mix of small, medium and large employers
- Most growth in small to medium size businesses
- Top 10 employers generate over \$233 million in annual GDP
- Key Job Clusters: energy, high tech, metals, construction, warehousing, food processing

## Canby Employer Establishments

Employee Count	2009	2020	%
0-1	166	227	37%
2-10	209	256	42%
11-25	63	76	12%
26-49	18	28	5%
50-100	17	17	3%
101+	8	12	2%
<b>Total</b>	<b>481</b>	<b>616</b>	<b>100%</b>

## Major Private Businesses

### Major Canby Employers

	Description	Annual GDP (\$M)	Emp. Range
Larusso Concrete Inc.	Masonry Contractors	\$ 13.6 to \$ 17.0	100-125
Marquis Companies I Inc.	Assisted Living Facilities for the Elderly	\$ 11.8 to \$ 14.1	125-150
Wilson Construction Co.	Power and Communication Line Construction	\$ 17.0 to \$ 20.4	125-150
Shimadzu USA Manufacturing Inc.	Analytical Laboratory Instrument Manufacturing	\$ 24.7 to \$ 28.2	175-200
Kendal Floral Supply LLC	Flower, Nursery Stock, and Florists' Supplies	\$ 22.8 to \$ 26.0	175-200
MEC Northwest	Printed Circuit Assembly Manufacturing	\$ 24.7 to \$ 28.2	175-200
JMJ Construction LLC	New Single-Family Housing Construction	\$ 27.1 to \$ 30.5	200-225
Johnson Controls Battery Group Inc.	Storage Battery Manufacturing	\$ 28.2 to \$ 31.7	200-225
Fred Meyer	Warehouse Clubs and Supercenters	\$ 21.3 to \$ 23.4	250-275
Colima Construction LLC	Drywall, Plaster Work & Building Insulation	\$ 40.7 to \$ 47.5	300-350

Source: Clackamas County Economic Landscape analysis by FCS GROUP, 2022.

Note: Data represents employment in 2020

# Canby Employment Land Needs

- Canby is projected to add 3,355 to 7,237 jobs over next 20 years
- Most growth in small to medium size businesses
- Demand will support 64,000+ SF of redevelopment
- Vacant land demand ranges from 264 to 625 acres
- This forecast excludes additional land needed for schools or parks

Canby "Covered Employment" Growth Forecast: 2023 to 2043

Sector	2023 est	Projected Net New Jobs		
	Existing Jobs	Low	Middle	High
Industrial Trades	4,012	2,238	3,761	5,632
Retail Trade	807	182	193	204
Services	2,758	914	1,138	1,374
Government	89	20	23	27
<b>Total</b>	<b>7,665</b>	<b>3,355</b>	<b>5,115</b>	<b>7,237</b>

Source: Oregon Employment Department and FCS.



Canby UGB Land Needs for Employment (gross unconstrained acres)

General Land Use / Building Type	Low	Middle	High
Commercial (retail, office, lodging)	25	29	34
Industrial (flex, gen. Ind., W/D, etc.)	238	395	587
Public & Education (excl. schools & parks)	2	2	3
<b>Total (unconstrained acres)</b>	<b>264</b>	<b>427</b>	<b>625</b>

# Employment Land Requirements

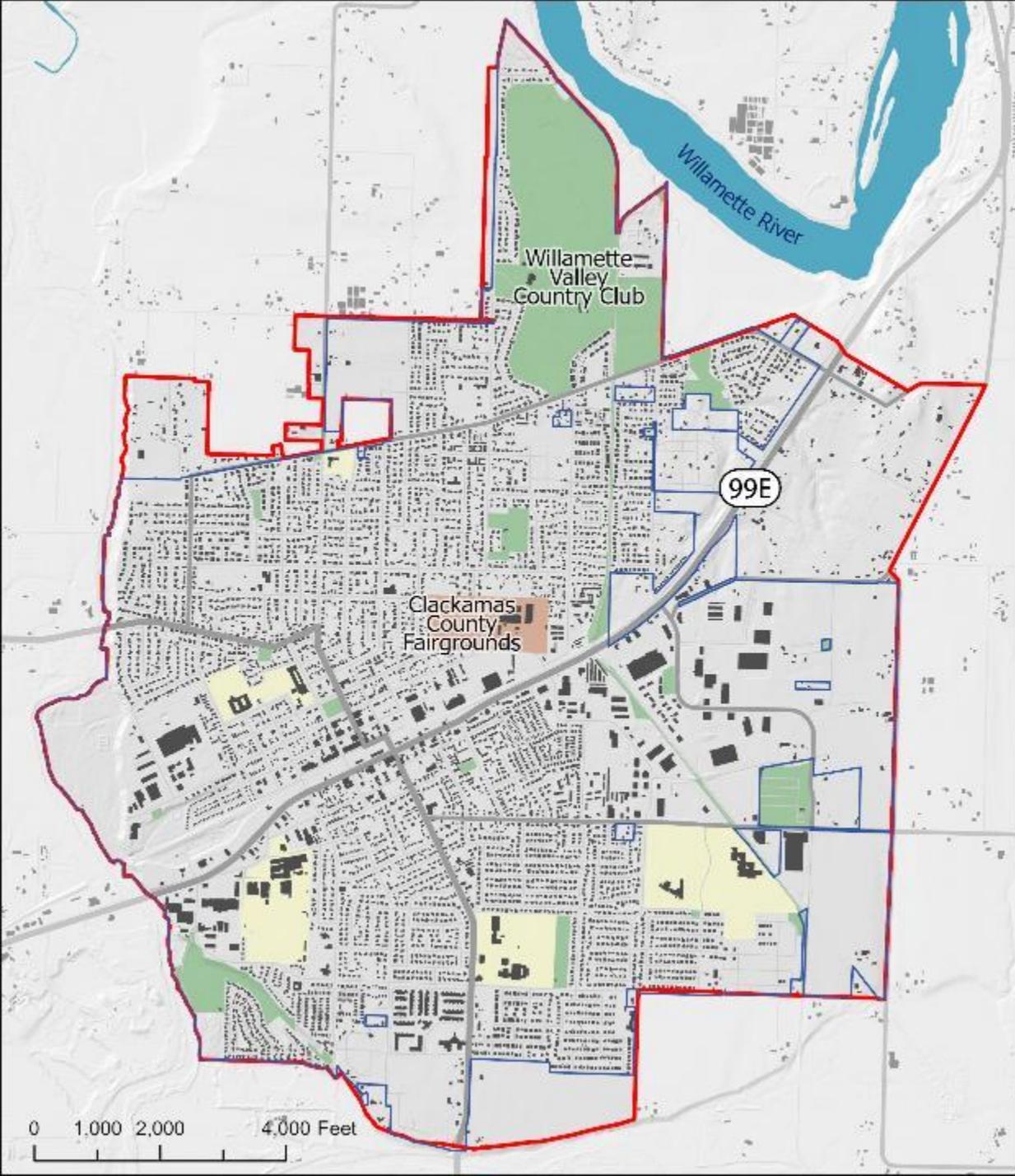


	Small Users	Medium Users	Large Users
<b>Avg. Employment</b>	<i>Less than 25</i>	<i>26 to 99</i>	<i>100 to 200+</i>
<b>Expected Canby Share</b>	<i>70-80%</i>	<i>15-20%</i>	<i>5% to 10%</i>
<b>Industrial Uses</b> Distribution Advanced Tech. Manufacturing Other Manufacturing	Building tenants or infill redevelopment sites	3 to 7 acres per user	8 to 20 acres per user
<b>Office Uses</b> Professional & Tech. Services Corp. Headquarters Financial Services Health Care	Building tenants or home based	< 1-2 acres per user	3 to 5 acres per user
<b>Retail and Misc. Services</b>	Downtown redevelopment, plus a 6-10 acre Neighborhood Center or Lifestyle Center		

# Buildable Land Inventory

# Canby UGB

The City of Canby is made up by over 3,000 acres. Canby's urban growth boundary adds another 450 acres.

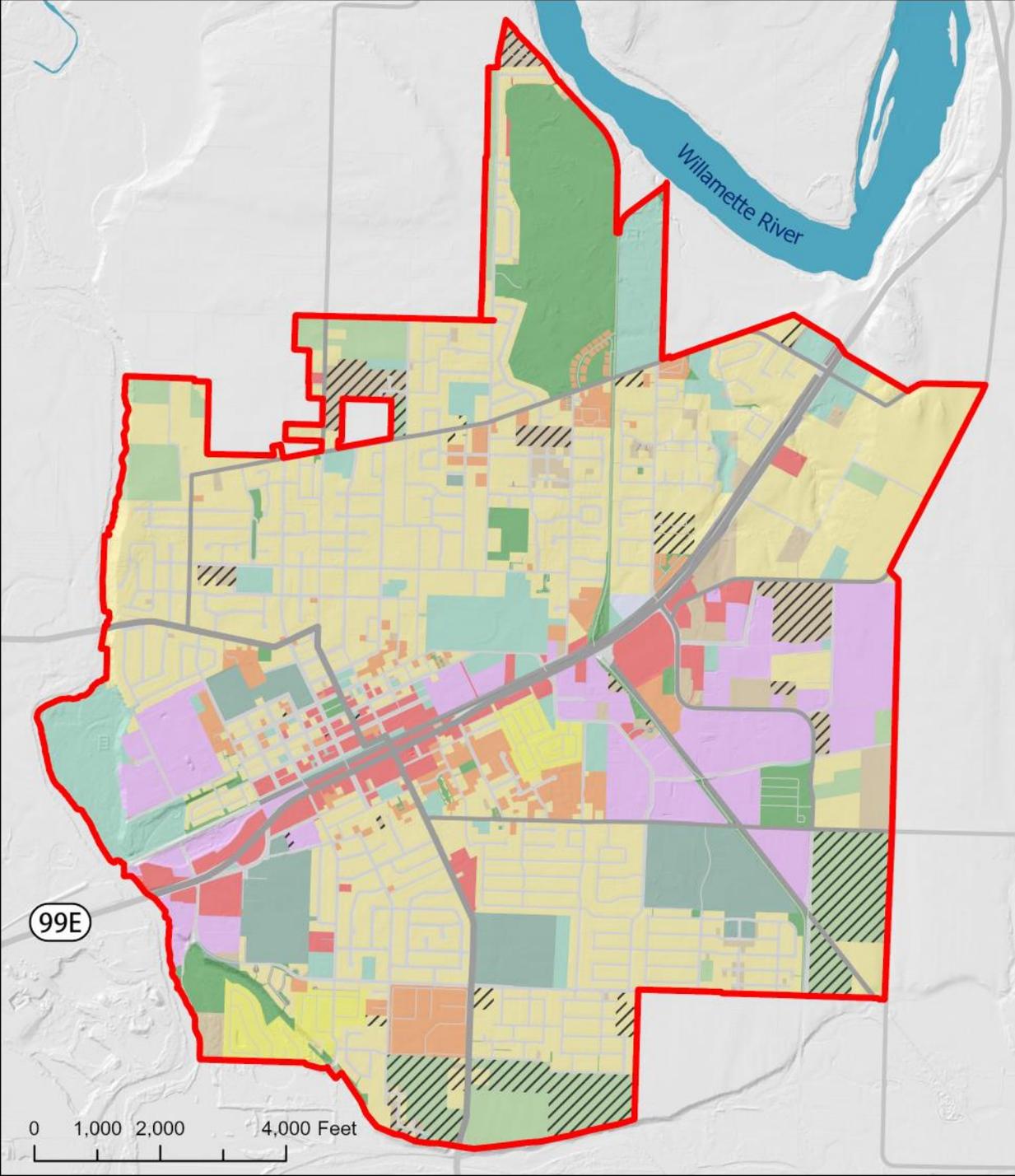


- City of Canby
- UGB (2018)
- Building Footprints
- Clackamas County Fairgrounds
- Open Space
- School

# Developments in the Pipeline

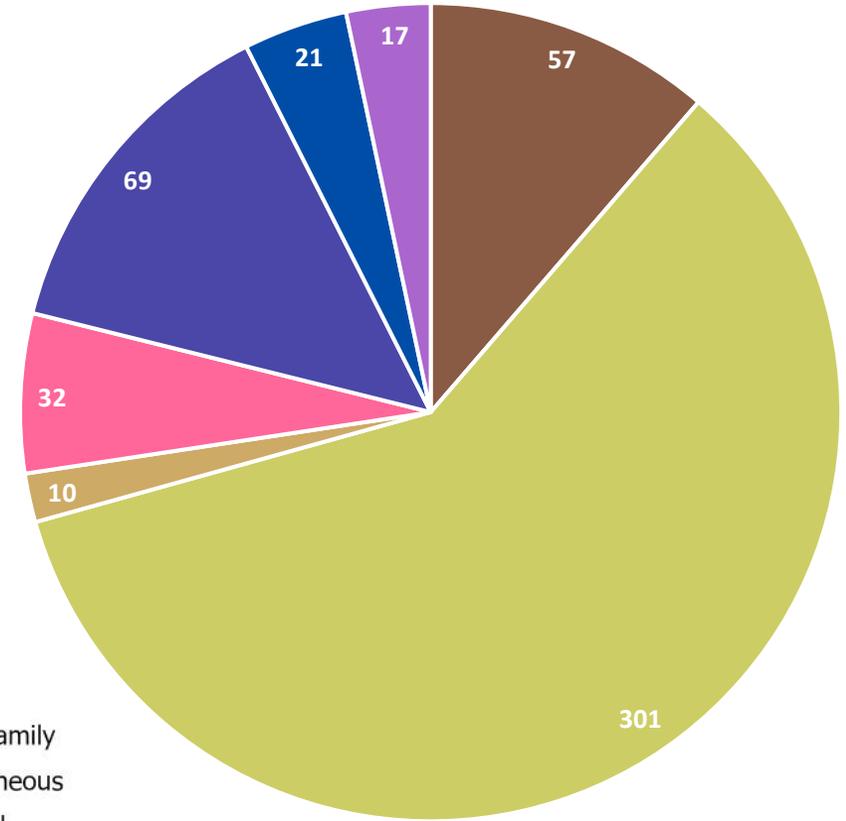
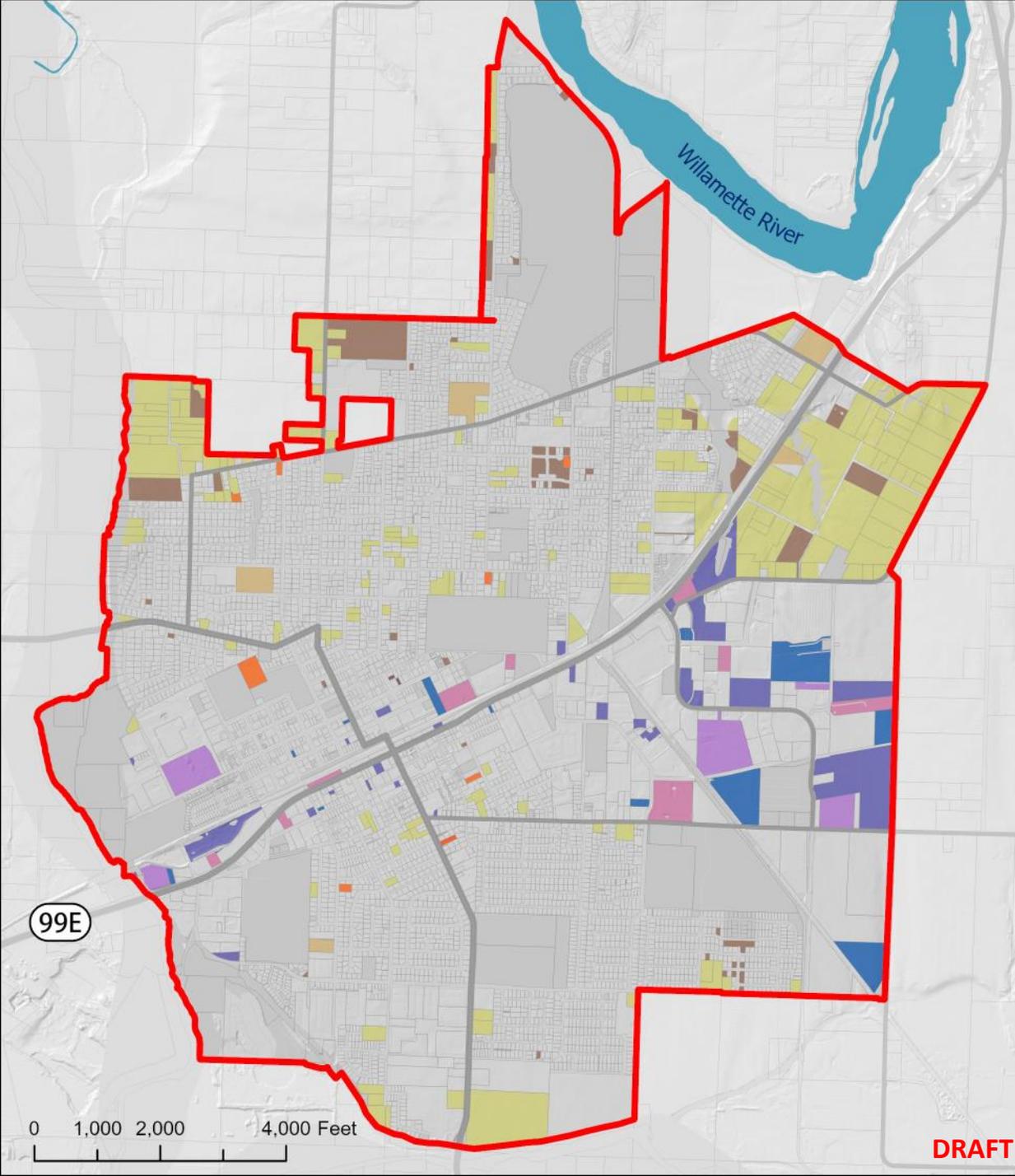
627 additional housing units are approved or under review. Two large senior housing projects are also in the pipeline.

Industrial development ranges from warehousing/distribution to manufacturing.



0 1,000 2,000 4,000 Feet

# Canby UGB Buildable Land Inventory



- UGB (2018)
- Taxlots
- Constraints
- Residential Vacant
- Partially Vacant Single Family
- Partially Vacant Miscellaneous
- Redevelopment Potential
- Employment Vacant
- Partially Vacant 50/50 split
- Partially Vacant Orthomap
- Redevelopment Potential

Buildable Land in acres\*

\*Combines residential and employment Redevelopment Potential

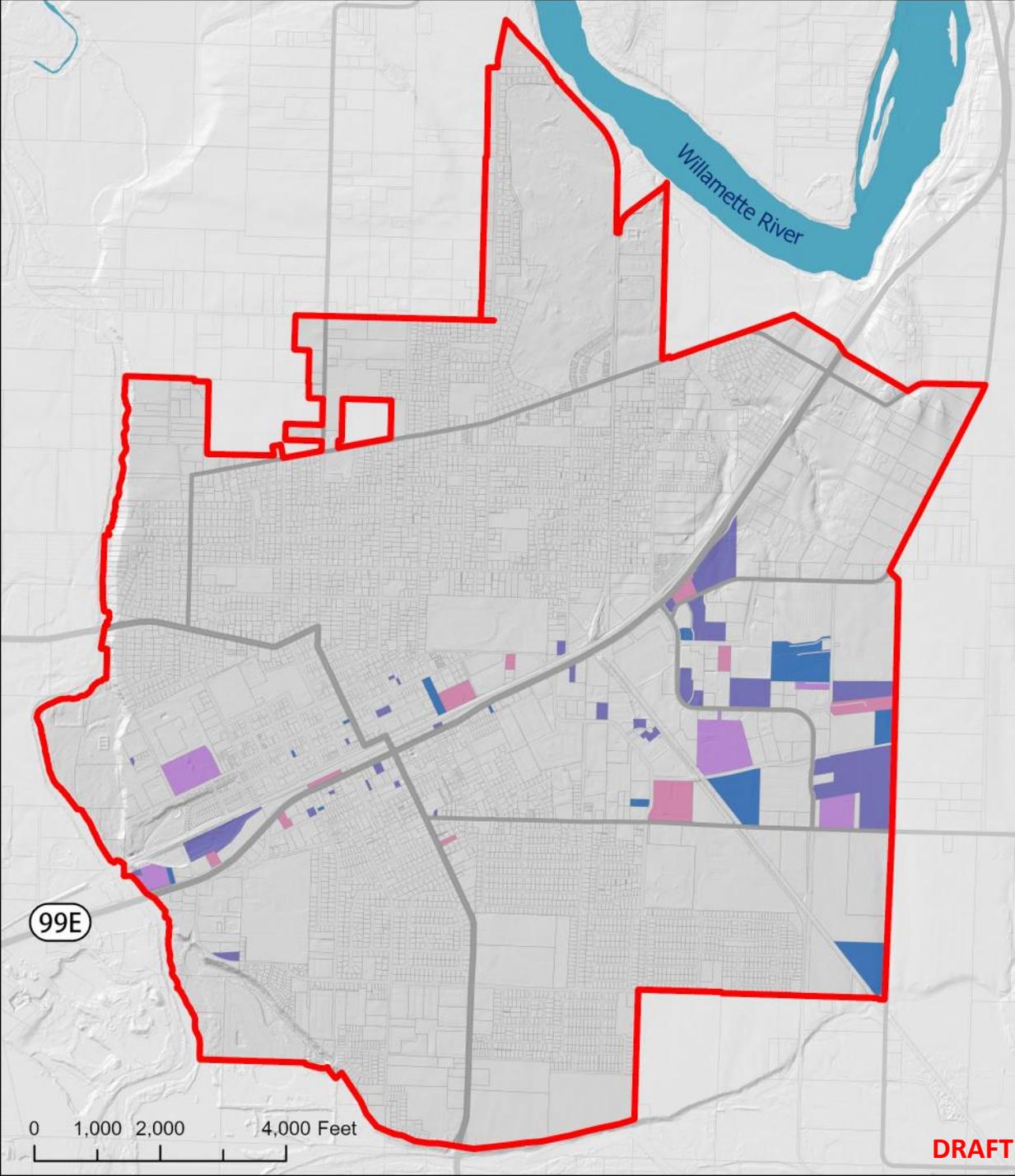
# Employment Buildable Land Inventory

Canby has 133 acres spread among 51 vacant lots: 23 lots assumed partial vacant and 11 lots with redevelopment potential.

Land Use Plan Designations	Buildable Vacant	Partial Vacant	Redevelopment	Total
DC - Downtown Commercial	1.0	0.1	0	1
CM - Commercial/Manufacturing	4	3	2	9
HC - Highway Commercial	10	0.1	2	12
HI - Heavy Industrial	16	9	1	27
LI - Light Industrial	38	26	20	84
<b>Total</b>	<b>70</b>	<b>38</b>	<b>25</b>	<b>133</b>

- UGB (2018)
- Taxlots
- Employment Vacant
- Partially Vacant 50/50 split
- Partially Vacant Orthomap
- Redevelopment Potential

***Only 1 vacant lot over 10 acres and 4 vacant lots of 5-9 acres***



# **Draft Reconciliation of Residential Land Supply and Demand**

# Residential Land Needs

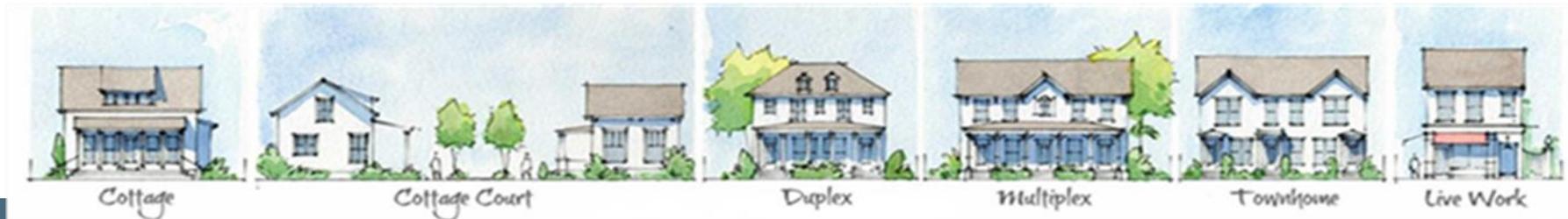
## Preliminary Findings

Canby has a deficit of 146.5 acres to accommodate the 20-year population growth forecast

Projected 20-year Land Sufficiency for Housing, Canby UGB				
Dwelling Unit Type	Applicable Plan Designation	Gross Buildable Land Requirement (gross acres)	Current Buildable Land Inventory (gross acres)	Net Buildable Land Surplus or Deficit (acres)
Single Family Detached	LDR	432.5	296.0	(158.0)
Mfd. Homes & Cottages	LDR	21.5		
Townhomes / Plexes	MDR	39.9	63.0	23.1
Multifamily (5+ units)*	HDR, RC	26.2	14.6	(11.6)
<b>Total</b>		<b>520.1</b>	<b>373.6</b>	<b>(146.5)</b>

Source: prior tables; and interpretation of current zoning code and housing development/market conditions.

\* Category also includes group quarters housing demand.



# Employment Land Needs

Canby has a deficit of up to 450 acres to accommodate the 20-year employment growth forecast

## Preliminary Findings

### Canby Urban Growth Boundary Employment Land Needs (acres)\*

Land Use Classification	Land Supply	Land Need (Demand)			Net Land Surplus or (Deficit)		
		Low	Middle	High	Low	Middle	High
Commercial (DC, HC)	10.0	24.5	29.3	34.4	(14.5)	(19.3)	(24.4)
Industrial & Flex (CM, LI, HI)	165.0	240.0	397.2	590.2	(75.0)	(232.2)	(425.2)
<b>Total Buildable Land Need</b>	<b>175.0</b>	<b>264.5</b>	<b>426.5</b>	<b>624.5</b>	<b>(89.5)</b>	<b>(251.5)</b>	<b>(449.5)</b>

\* gross buildable unconstrained acres.

# Open House Discussion

- **What types of housing does Canby need/  
need more of?**
- **What are the barriers to housing  
development?**
- **What types of businesses and jobs does  
Canby need/need more of?**
  - **In downtown?**
  - **In industrial areas?**

# Thank You!

<https://www.canbyoregon.gov/dev-services/page/canby-housing-and-economic-opportunity-assessments>



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